

## NEOGOV PE – TRAINING GUIDE

### Objective:

This Training Guide focuses on how to navigate NEOGOV PE and perform the routine employee and manager tasks that may arise during the course of a performance plan (evaluation) year.

### Pre-Requisite Requirements:

- The Agency is actively using NEOGOV PE for performance management.
- Users have been activated in the system.
- Evaluations have been assigned.

### Helpful Tips:

- Performance plans can also be called evaluation plans.
- Clicking on the NEOGOV icon in the upper left hand corner always returns a user to their dashboard.

INDEX: Select hyperlink below to go to information.

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## LOGIN

You can access NEOGOV PE using the following link: <https://login.neogov.com/signin?siteCode=PE>

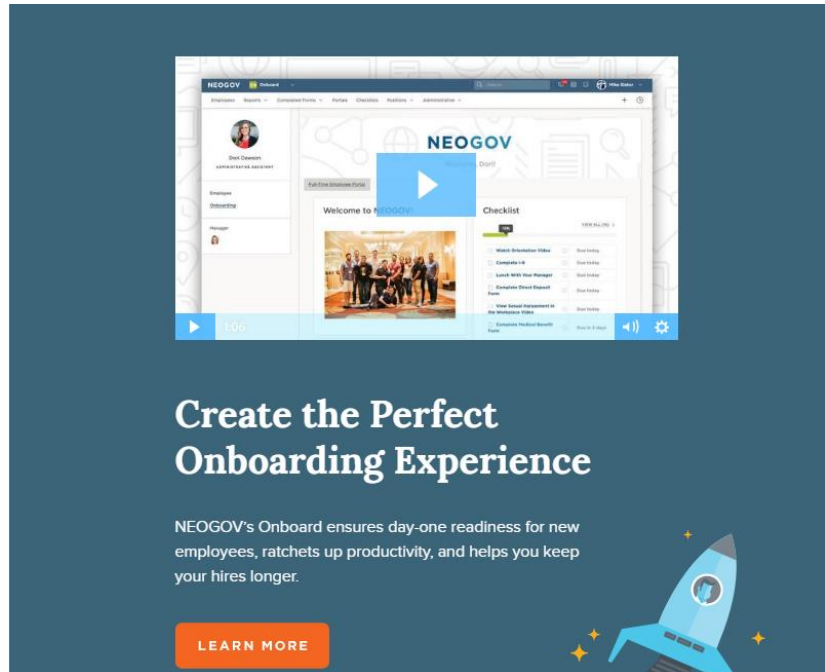
You should have received an **Activate Your NEOGOV PE User Account** email with a link to create your account **Password** using your email address as your **Username**. (this will change to “h” id)

**NOTE:** Current NEOGOV Insight HR Users will use their Insight username and password.

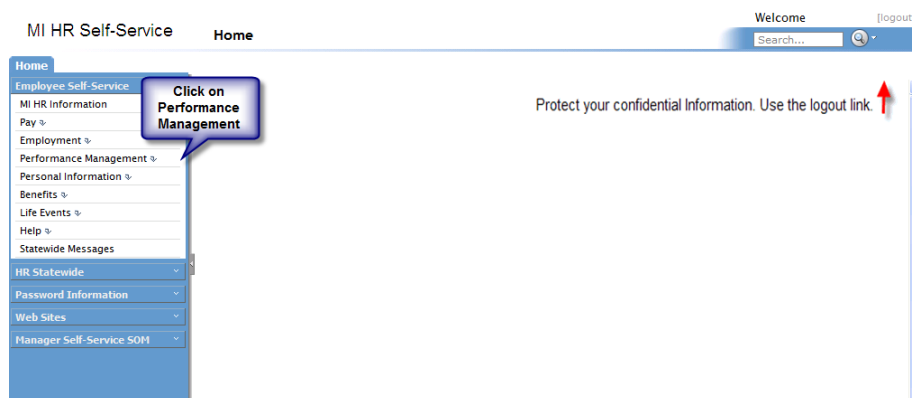
1. Log into the NEOGOV PE site using your **Username** and **Password**. Click on the **Sign In >>** button.



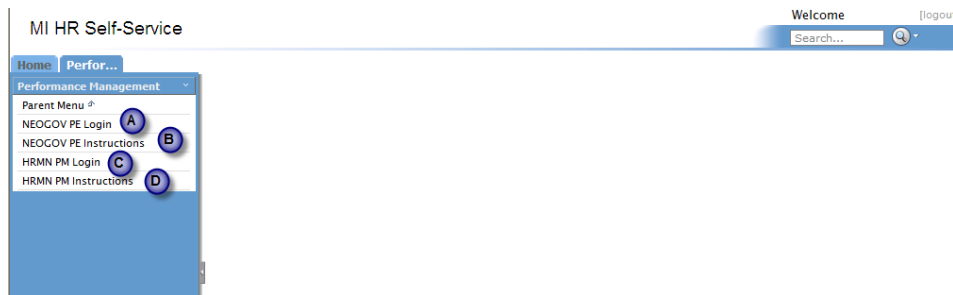
The login form features the NEOGOV logo at the top. Below it are two input fields: 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. At the bottom, there are two links: 'Forgot username?' and 'Forgot your password?'.



2. The system can also be accessed in MI HR Self Service; under the **Performance Management** bookmark.



3. In the Performance Management bookmark are links to the following:
- A. **NEOGOV PE login**--If you have been provided with an email to access NEOGOV PE, use this link.
  - B. **NEOGOV PE instructions**--For information on how to use NEOGOV PE including an overview of the system, use this link.
  - C. **HRMN PM login** (HRMN Performance Management system)--If you have current plans in the HRMN PM, you will finish your plan there before using NEOGOV PE. Therefore, use this link.
  - D. **HRMN PM instructions**--For information on how to use HRMN PM, use this link.



## Dashboard

1. Upon login, you will see your **My Dashboard** screen. The employee dashboard serves as your personal homepage. It contains a section for assigned tasks and icons/links to your performance evaluations.
2. The **My Tasks** section displays a complete list of your current tasks including personal tasks you have created and others related to performance (evaluation) or development plans assigned to you. Tasks are covered in detail later in this document. The **Related To** column indicates the purpose of the task and provides a direct link to that item.
3. Only current tasks are displayed by default. You can review completed tasks also by clicking the **View All** link, clicking on the **Current** drop down box and selecting **Completed**.
4. Columns can be sorted using the **Sort** symbol within the column header.
5. The **My Evaluations, View All of My Evaluations** link takes you directly to the Employee Details page where you can select and view your performance evaluation(s).
6. Clicking on the title of an evaluation takes you directly to that **Evaluation Details** page.

Evaluation Dashboard **1**

### My Tasks [view all >](#)

<b>1</b> Total	<b>1</b> Rating	<b>0</b> Approve And Sign	<b>0</b> Sign	<b>0</b> Approve	<b>0</b> Other	<b>1</b> Overdue
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hide table ^

Task <b>2</b>	For Employee <b>4</b>	Related To	Due Date
★ Rating For MCSC EMPLOYEE's Job Aids	MCSC EMPLOYEE	Job Aids	⚠ 12/31/2015

1 - 1 of 1 items

### My Evaluations [view all of my evaluations >](#) **5**

**Job Aids-3**  
Due: Mon, Dec 31, 2018  
Status: Draft

**Job Aids-2** **6**  
Due: Mon, Jul 31, 2017  
Status: Draft

**Job Aids-1**  
Due: Sat, Dec 31, 2016  
Status: Draft

If you are a Manager, the dashboard will have a few additional sections/items available:

- The Manager/Supervisor **Dashboard** will include your assigned direct reports. Their name(s) will appear beneath the **My Direct Reports** header. You will also see the Civil Service classification, overdue tasks, and ability to create journal entries for each employee in the direct reports section.
- The **My Tasks** section includes tasks related to performance (evaluation) plans for you and your direct reports. These tasks - to conduct ratings - are assigned from the performance (evaluation) plan template.

Evaluation Dashboard

### My Tasks [view all >](#)

<b>1</b> Total	<b>1</b> Rating	<b>0</b> Approve And Sign	<b>0</b> Sign	<b>0</b> Approve	<b>0</b> Other	<b>1</b> Overdue
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hide table ^

Task	For Employee	Related To	Due Date
★ Rating For MCSC EMPLOYEE's Job Aids <b>8</b>	MCSC EMPLOYEE	Job Aids	⚠ 12/31/2015

1 - 1 of 1 items

### My Evaluations [view all of my evaluations >](#)

**Job Aids-3**  
Due: Tue, Dec 31, 2019  
Status: Draft

**Job Aids-2**  
Due: Mon, Dec 31, 2018  
Status: Draft

**Job Aids**  
Due: Sun, Dec 31, 2017  
Status: Draft

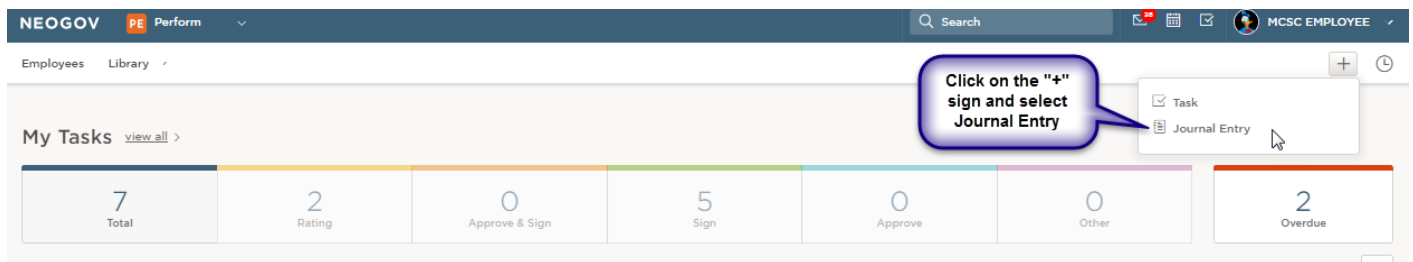
### My Direct Reports **9**

MCSC EMPLOYEE  
PE-Human Resources Analyst

- When you click on a Direct Report, you are taken to the employee's **Employee Details** page where you can view their position information in addition to their assigned performance evaluation list. The employee's **Dashboard** is not available to the manager/supervisor and will not appear in the list below their picture.

## Journal Entries

1. **Journal entries** are a helpful tool to encourage continuous communication between users of NEOGOV PE; for example, between a manager and direct reports. Journal entries can be entered from the **Dashboard** and are available to add within the rating card during a performance (evaluation) plan rating.
  - a. Only the original owner of a journal entry can edit or delete it.
  - b. Initially, all journal entries are private, and viewable only to the creator. A sharing feature does exist to allow for sharing an entry with other system users.
  - c. Objectives and competencies can be tagged in the text of a journal entry to all for additional filtering within the system and specifically within the rating card during a performance (evaluation) plan rating.
2. After logging in, you will be at your **Dashboard**.
3. To enter a journal entry for **yourself (employee)**, click on the **+ sign** in the upper right hand corner and select **Journal Entry**.



- a. A slide-out window appears. Enter and select your **name** and then **enter and format the text**. To "tag" an objective/competency type @ and the name of the objective/competency (ex: @adaptability). Click on the related item to select it. Click on **Save**.

### New Journal Entry

The screenshot shows the 'New Journal Entry' form. At the top, there's a label 'Who is this entry about? \*' and a dropdown menu showing 'MCSC EMPLOYEE'. A callout bubble points to the dropdown with the text 'Type and select your name'. Below the dropdown is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), bulleted list, numbered list, link, and unlink. The text area contains the placeholder text 'Enter the journal entry here.... You can tag objectives and competencies by typing an "@" sign.' A callout bubble points to the text area with the text 'Enter the journal entry here and tag any associated objectives/competencies.' At the bottom right, there's a green 'Save' button. A callout bubble points to the button with the text 'Click on Save'.

4. As a manager, to enter a journal entry for a **direct report (manager role)**, find the employee card

under Direct Reports, and click on the blue paper icon within the information card.

**My Tasks** [view all](#) >

5 Total	3 Rating	0 Approve & Sign	2 Sign	0 Approve	0 Other	1 Overdue
------------	-------------	---------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
Sign Add an Objective for MCSC MANAGER	MCSC MANAGER	Add an Objective	10/04/2016
Rating For MCSC EMPLOYEE's State Police-Plan Acknowledgement	MCSC EMPLOYEE	State Police-Plan Acknowledgement	12/31/2016
Rating For MCSC EMPLOYEE's State Police-Overall Eval Flow-If Needed	MCSC EMPLOYEE	State Police-Overall Eval Flow-If Needed	12/31/2016
Sign 360 Review for MCSC MANAGER	MCSC MANAGER	360 Review	12/31/2016
Rating For RICHARD GODBOLD's Annual Eval Jan 1-Dec 31, 2016	RICHARD GODBOLD	Annual Eval Jan 1-Dec 31, 2016	12/31/2016

1 - 5 of 5 items

**My Evaluations** [view all of my evaluations](#) >

**360 Review**  
Due: Sat, Dec 31, 2016  
Status: Approval

**Add an Objective**  
Due: Sat, Dec 31, 2016  
Status: Not Started

**Job Aids**  
Due: Sat, Dec 31, 2016  
Status: Draft

**My Direct Reports**

MCSC EMPLOYEE  
PE-Human Resources Analyst

2  
10

click on the blue icon to enter a journal entry

BACK & HELP

- A slide-out window appears. Enter the **Journal Entry** text in the “click here to start a new entry...” box. Enter and format the text, then click on **Save**. To “tag” an objective/competency type @ and the name of the objective/competency (ex: @adaptability). Click on the related item to select it. Click on **Save**.

**Journal Entries for MCSC EMPLOYEE** [Close](#)

Click here to start a new entry...

Type the journal entry text

- All journal entries created are initially private (only the creator can view them) due to default system security. The system allows for tagging of employees/managers to let them view the entry. To tag a journal entry, after creating it, click on the people icon that appears when hovering over the section. Type the name of the employee(s) you would like to tag and select them to share the entry.

10 entries

MCSC EMPLOYEE last edited 12/15/16 10:25:28 AM  
New for job aid

To "tag" employees click on the blue people icon that appears when hovering over it.

ENTRY SHARED WITH  
Mcsc man

MCSC MANAGER last edited 11/21/16 02:31:03 PM

6. After a journal entry is shared, the "shared" icon appears.

10 entries

MCSC EMPLOYEE last edited 12/15/16 10:25:28 AM • shared

New for job aid

Shared

7. Journal entries can also be printed, or edited by the creator.

8. When finished, click on the close button to return to the Dashboard.

Journal Entries for MCSC EMPLOYEE

Click here to start a new entry...

Click on close

Close

## Employee Details

1. **Employee Details** contains employment information such as position (Civil Service classification), department, and start date.
2. This page also has your Performance Evaluation and Development Plan sections. **Performance (Plan) Evaluations** will include your current performance (evaluation) plan including the name (Job Aids in this example), type of plan (periodic or probation), and date due. **Development Plans** are not required but can be created together with your manager/manager/supervisor to track development of skills for future career growth.
3. **Reports** are available from the Employee Details page and are specific to the employee's performance (evaluation) plan review.

4. **Org Chart** will display your organizational placement based on your reporting relationship. Clicking on the up arrow will display your manager/manager/supervisor/direct manager/supervisor. You may be able to click up through higher levels in your organization if additional arrows appear. You will only be able to **Search** on your record. These settings are controlled by security.
5. To return to your Dashboard, click on the **NEOGOV** logo at the top of the screen.

**NEOGOV** Perform

Search

MCSC MANAGER

Employees Performance Evaluations Library Trainings Reports

**Employee Details**

Employee #: 456321  
 Email: peapi+employee@mitraining.com  
 Position: PE-Human Resources Analyst  
 Address:  
 Phone:  
 Active: Yes

Class Spec: PE-HUMAN RESOURCES ANALYST  
 Department: PE-CIVIL SERVICE COMMISSION  
 Division:  
 Online Access: Activated  
 Start Date: 05/07/2006  
 Separation Date:

**Performance Evaluations**

Evaluation List

Evaluation Name	Evaluation Type	Due Date	Status	Completion Date	Archived	Actions
Job Aids	Periodic	12/31/2015	Not Started		No	
Job Aids-1	Periodic	12/31/2016	Draft		No	
Job Aids-2	Periodic	07/31/2017	Draft		No	
Job Aids-3	Periodic	12/31/2018	Draft		No	

**Development Plans**

+

Development Plan Name	Begin Date	End Date	Actions
Demo	06/16/2015	06/18/2015	

## Menu Bar

### Employees

1. For an employee (who isn't a manager) the Employee List will display only your own employee record. To access your employee profile, click the first name, last name, or employee number. This will take you to the Employee Details page discussed previously in this document.

**NEOGOV** Perform

Search

MCSC EMPLOYEE

Employees Library

**Employee List**

Show All Employees Bulk Actions

Photo	Employee #	Last Name	First Name	Direct Manager	Position	Start Date	Online Access	Active
	456321	EMPLOYEE	MCSC	MCSC MANAGER	PE-Human Resources ...	05/07/2006	Activated	Yes

1 - 1 of 1 items

2. For an employee (who IS a manager), the **Employee List** will display your own employee record and those of your direct reports. To access a profile, click the first name, last name, or employee number.



This will take you to the associated Employee Details screen.

Employees Performance Evaluations Library Trainings Reports								
Employee List								
Show All Employees Bulk Actions								
Photo	Employee #	Last Name	First Name	Direct Manage	Position	Start Date	Online Access	Active
<input type="checkbox"/>	123789	MANAGER	MCSC	HR USER	PE-HUMAN RESOURC...	06/22/2002	Activated	Yes
<input type="checkbox"/>	456321	EMPLOYEE	MCSC	MCSC MANAGER	PE-Human Resources ...	05/07/2006	Activated	Yes

## Performance Evaluations

1. This menu option is only available to **managers** based on security settings.
2. From the **Performance Evaluation** list a manager can assign objectives in bulk, export items to Microsoft Excel, or print the selected evaluations. Assigning objectives in bulk is covered the **Bulk Objectives** section of this document.

NEOGOV PE Perform							Actions	
Employees Performance Evaluations Library Trainings Reports							Done	
Evaluation List							EXPORT ACTIONS	
Evaluation List Bulk Actions							Export to PDF	
							Export to Excel	
							Export to CSV	
							EVALUATION BULK ACTIONS	
							Assign Objectives	
							Print	
Name	Employee #	Employee	Department	Raters of	Type			
<input type="checkbox"/>	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic			
<input type="checkbox"/>	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	HR USER	Periodic			
<input type="checkbox"/>	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	HR USER	Periodic			
<input type="checkbox"/>	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	HR USER	Periodic			
<input type="checkbox"/>	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic			
<input type="checkbox"/>	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic			
<input type="checkbox"/>	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic			

## Library

1. Department objectives will appear in the **Objective List** as they are added by departments. Objectives can be added to an evaluation using **"From Library"** which will be covered in the **Evaluation** section of this document.
2. Objectives can be exported to Microsoft Excel or Adobe PDF using the Bulk Action tool.

Objective List					
View Current Bulk Actions					
Name	Description	Category	Active	Archived	Actions
<input type="checkbox"/>	1901 CSC Follow the Approved Standardize...	Follow the approved standardized office set-up. Use consistent and uniform org...	Department Plan	Yes	No

3. The **Competency List** will display all of the State of Michigan competencies available for performance (evaluation) plans. Clicking on the name of any Competency will reveal the description, which is also

available on this screen.

4. Competencies can be exported to Microsoft Excel or Adobe PDF using the Bulk Action tool.

#### Competency List

View Current		Bulk Actions					
	Name	Description	Category	Active	Archived	Actions	
<input type="checkbox"/>	Action Orientation (Judicial Prof)	Initiating action with a drive to achieve and to be successful in whatever they at...	Judicial Professional	Yes	No		
<input type="checkbox"/>	Adaptability (100)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 1 Competencies	Yes	No		
<input type="checkbox"/>	Adaptability (200)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 2 Competencies	Yes	No		
<input type="checkbox"/>	Adaptability (310)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 3 Manager Competencies	Yes	No		
<input type="checkbox"/>	Adaptability (320)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 3 Supervisor Competenc...	Yes	No		
<input type="checkbox"/>	Adaptability (400)	Maintaining effectiveness when experiencing major changes in personal work ta...	Group 4 SES	Yes	No		

## Trainings

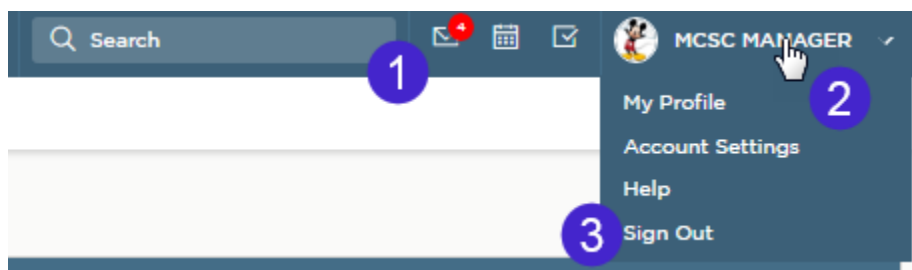
This menu option is only available to the Manager role, and is not used by the State of Michigan.

## Reports

This menu option is only available to the Manager role based on configured system security. Managers have the ability to run reports on their direct reports. Reports, in detail, will be covered in the **Reports** section of this document.

## Other Items

1. Also available along the upper-right of your screen is a search bar and links to your **Messages**, **Calendar**, and **Task Listing** (all specific to NEOGOV PE).
2. Further, if you hover over your **Name** a profile menu will display. This menu provides quick access to your employee profile (**My Profile**), the PE Help Center (**Help**), **Account Settings**, or **Sign-Out**.
3. To exit NEOGOV PE, click on **Sign Out**.



## Performance Evaluation (Plan) Overview

1. Employee performance (evaluation) plan templates will be established for all employees. These templates will include tasks to acknowledge the plan and ratings. In addition to the acknowledgement tasks, these templates may also include tasks to self-rate your own plan. You will see these tasks in your **My Tasks** section of the dashboard. Once a task is completed, it is removed from the “current” view of the **My Tasks** section on the dashboard.

**NOTE:** The **acknowledgement tasks** will not populate in the **tasks section** of the dashboard until the

performance (evaluation) plan has been started/made ready for review (published) by your manager/supervisor and the evaluation/plan is at the associated step. How to acknowledge a performance (evaluation) plan/rating is covered in the **Acknowledgement of Plan and Acknowledgement of Rating sections** of this document.

The screenshot shows the NEOGOV Perform dashboard for a user named MCSC EMPLOYEE. The 'My Tasks' section displays a progress bar with counts for Total (2), Rating (0), Approve & Sign (0), Sign (2), Approve (0), Other (0), and Overdue (0). Below this is a table of tasks:

Task	For Employee	Related To	Due Date
Sign Demo of Job Aids for MCSC EMPLOYEE	MCSC EMPLOYEE	Demo of Job Aids	04/23/2016
Sign MSHDA Demo 3-29-16 for MCSC EMPLOYEE	MCSC EMPLOYEE	MSHDA Demo 3-29-16	12/31/2016

The 'My Evaluations' section shows three evaluation cards: 'Demo of Job Aids' (Due: Sat, Dec 31, 2016, Status: Not Started), 'MSHDA Demo 3-29-16' (Due: Sat, Dec 31, 2016, Status: Approval), and 'Job Aids' (Due: Thu, Dec 31, 2015, Status: Draft). A callout bubble labeled 'Signature Tasks' points to the first task in the table.

- Click on the link for **View All of My Evaluations** or the **Evaluation Card** displaying on the dashboard. Note: Only the most recent 3 evaluations will display as evaluation cards on the dashboard. They are sorted by due date in descending order.

This screenshot is similar to the previous one but includes two callout bubbles. One bubble points to the 'view all of my evaluations' link in the 'My Evaluations' section, with the text: 'Click on View All Of My Evaluations to go to the Evaluation Detail Page'. The other bubble points to the 'Job Aids' evaluation card, with the text: 'Click on the evaluation card to be taken to the specific evaluation'.

- Clicking on the **Evaluation Card** will take you directly to the related **Evaluation Details page**. Clicking on **View All of My Evaluations** will take you to the **Employee Details** page where the performance (evaluation) plan template will be listed in the **Performance Evaluations** section of the page.
- From the **Employee Details** page, click on the plan (evaluation) name.

NEOGOV

PE Perform

Search

13

MCSC EMPLOYEE

Employees Library

+

MCSC EMPLOYEE

PE-HUMAN RESOURCES ANALYST

My Dashboard

Employee

Reports

Org Chart

Manager

Click on the Evaluation Name

Employee Details

Employee #: 456321

Email: peapi+employee@mitraining.com

Position: PE-Human Resources Analyst

Address:

Phone:

Active: Yes

Class Spec: PE-HUMAN RESOURCES ANALYST

Department: PE-CIVIL SERVICE COMMISSION

Division:

Online Access: Activated

Start Date: 05/07/2006

Separation Date:

Performance Evaluations

Evaluation List

Evaluation Name	Evaluation Type	Due Date	Status	Completion Date	Description	Arch
Job Aids	Periodic	12/31/2015	Not Started			No

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FEEDBACK & HELP

- The **Evaluation Detail** page lists information specific to your performance (evaluation) plan including name, type (periodic or probation), your name, position, and department/division.
- The performance (evaluation) plan template will be in **Draft Status** upon receipt and will remain in that status until it is started/ready for review (published).
- Most agencies have established performance (evaluation) plan dates. The dates you receive will reflect the established dates for your agency or organizational unit including the **Due Date**. (Probationary plans will be covered in a separate module.)
- The **Overall Rating** will display as Pending until the performance (evaluation) plan review has been completed.
- If your agency is using a paper performance plan process, you will be notified and provided instructions on using the **Print a Blank Rating Form** function.
- Changes can be made to objectives and competencies in the plan until the Manager/Supervisor has started/made the plan ready for review (published it).



MCSC EMPLOYEE  
PE-HUMAN RESOURCES ANALYST

Employee

Reports

Org Chart

Manager

### Job Aids-1

MCSC EMPLOYEE

print preview

copy evaluation

print blank form

start evaluation

Overall Rating

Pending

### General Information

DUE DATE

Sat. Dec. 31, 2016

STATUS

Draft

Evaluation Name

Job Aids-1

Type

Periodic

Archived

No

Employee

MCSC EMPLOYEE

Position

PE-Human Resources Analyst

Department

PE-CIVIL SERVICE COMMISSION

11. **Objectives** - These are the individual actions that the Manager/Supervisor and employee agree the employee will be rated on in this performance (evaluation) plan for this rating period. Objectives should be SMART (Specific, Measureable, Attainable, Relevant, and Time-Based). Please see your HR Office if you need assistance in creating, or understanding SMART objectives.

12. Employees/Managers can add objectives (and edit/delete those they add) until the performance (evaluation) plan is started/ready for review (published). Some Managers/Supervisors may solicit employee assistance in the addition of objectives. Other Managers/Supervisors may complete all of the plan updates in PE.

NEOGOV

PE Perform


Search

15

MCSC EMPLOYEE

Employees

Library



MCSC EMPLOYEE  
PE-HUMAN RESOURCES ANALYST

My Dashboard

Employee

Reports

Org Chart

Manager

### General

DUE DATE

Thu. Dec. 31, 2015

STATUS

Draft

Evaluation Name

Job Aids

Type

Periodic

Archived

No

Employee

MCSC EMPLOYEE

Position

PE-Human Resources Analyst

Department

PE-CIVIL SERVICE COMMISSION

### Content

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

1901 CSC Utilize Wee...

Utilize weekly reports effectively to monitor and ...

0%

×

1901 CSC Utilize the ...

Utilize the Siebel application fully, including the ...

0%

×

1901 CSC Follow the ...

Follow the approved standardized office set-up. ...

0%

×

13. **Competencies** are assigned to the performance (evaluation) plan template based on ECP (Equitable

Classification Plan) Group.

14. Employees/Managers can add/delete competencies until the performance (evaluation) plan is started/ready for review (published). Some Managers/Supervisors may solicit employee assistance in the deletion or addition of competencies. Other Managers/Supervisors may complete all the plan updates in PE.

COMPETENCY SECTION | STANDARD 3 POINT

**Competency Section**

+ Add Items

Items	Description	Actions
Contributing to Team Success (10)	Actively participating as a member of a team to move the team toward the completion of goals.	X
Decision Making (100)	Identifying and understanding issues, problems, and opportunities; comparing data from different sources to draw co...	X
Interpersonal Skills (100)	Considering and responding appropriately to the needs, feelings, and capabilities of others; adjusting approaches to ...	X
Job Knowledge (100)	Behaviors should be specific to the individual job.	X
Managing Work (100)	Effectively managing one's time and resources to ensure that work is completed efficiently; makes timely requests fo...	X
Quality Orientation (100)	Accomplishing tasks by considering all areas involved, no matter how small; showing concern for all aspects of the jo...	X

15. Notes/Attachments can be added within the evaluation with items specific to the rating period.

Notes & Attachments

**Notes & Attachments**

+ Add Notes & Attachments

16. The Process Timeline portion of the performance (evaluation) plan includes the following:

- a. **Plan (evaluation) Acknowledgements** are defaulted via the performance (evaluation) plan template. The acknowledgement is used to have an employee and/or manager certify that they have seen and reviewed the objectives and competencies assigned in the performance (evaluation) plan that will be used for the current rating period.

**NOTE:** The plan acknowledgement task is not available to an employee until the performance evaluation is started/ready for review (published). How to acknowledge a performance (evaluation) plan is covered the **Acknowledgement of Plan section** of this document.

**Process**

+ Add Task

1

**Before Ratings**

**Employee Acknowledgement**

Signature MCSC EMPLOYEE	Due Wed, Dec 23, 2015	Status Pending 12/16/2015	Step is required Yes
----------------------------	--------------------------	---------------------------------	-------------------------

- b. Self/Peer Ratings can be used to assign a self/peer rating to the performance (evaluation) plan. This is typically assigned within the performance (evaluation) plan template. Please contact your HR Office to have self/peer ratings added to the plan.
- c. The **Rating of Record** is assigned on the performance (evaluation) plan template. Employees may be required to conduct a self-rating before the performance (evaluation) plan due date.

**NOTE:** The manager/supervisor is required to rate the employee before the performance (evaluation) plan due date. The manager/supervisor rating due date in the example below is 12/31/2015. The manager/supervisor serves as the **Rater of Record**.

#### Ratings

2

Rating	Due	Status	Step is required	Weight
MCSC MANAGER	Thu, Dec 31, 2015	Pending 12/16/2015	Yes	100 %

- d. The **Rating Acknowledgements** are defaulted via the performance (evaluation) plan template. The rating acknowledgement is used to have the employee certify that they have seen and reviewed the performance (evaluation) plan rating for the current rating period. How to acknowledge a performance rating is covered in the **Acknowledgement of Rating section** of this document.

#### After Ratings

3

**Rating Acknowledgement**

<b>Signature</b>	Due	Status	Step is required
MCSC EMPLOYEE	Thu, Dec 31, 2015	Pending 12/16/2015	Yes

Evaluation Due Date	Thu, Dec 31, 2015
---------------------	-------------------

- e. Tasks can be added to the performance (evaluation) plan and will be covered in the Notes/Attachments/Tasks section of this document.

17. When the performance (evaluation) plan is complete, the Manager/Supervisor will start/make the evaluation ready for review (publish). Once the plan is started/ready for review (published), changes cannot be made to the plan (unless reverted to draft status). This will be covered in more detail in the **Edit/Start Performance (Evaluation) Plan** section of this document.

18. After the performance (evaluation) plan is started/ready for review (published), an email is sent to regarding the **Acknowledgement of Plan**. After the acknowledgment of the plan (if additional acknowledgements are not required), a **Rate** star appears for the manager meaning that the plan is available for rating. (a rate star will only populate for the employee if a self-rating is assigned to the evaluation).
19. Once ready for review, the **Status** of the performance (evaluation) plan changes from **Draft** to **Not Started**.
20. The performance (evaluation) plan can now be printed using the **Print** feature.

**NEO GOV** PE Perform Search MCSC EMPLOYEE

Employees Library

**Evaluation Detail**

**Overall Rating**  
Pending

sign print print blank form

**General**

**DUE DATE**  
Thu. Dec. 31, 2015

**STATUS**  
Not Started

Evaluation Name	Job Aids	Employee	MCSC EMPLOYEE
Type	Periodic	Position	PE-Human Resources Analyst
Archived	No	Department	PE-CIVIL SERVICE COMMISSION

### Edit/Start Performance (Evaluation) Plan

1. After you log in, from the **My Dashboard** screen one of the following will apply:
  - a. **Employee**—Click on the **performance (evaluation) plan card** that you wish to view/edit, which will take you directly to the related **Evaluations Details** page. Or, click on the link **View All of My Evaluations**. This will take you to the **Employee Details** page where the performance (evaluation) plan template will be listed in the **Performance Evaluations** section of the page.



## Evaluation Dashboard

### My Tasks [view all >](#)

1 Total	1 Rating	0 Approve And Sign	0 Sign	0 Approve	0 Other	1 Overdue
------------	-------------	-----------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
★ Rating For MCSC EMPLOYEE's Job Aids	MCSC EMPLOYEE	Job Aids	12/31/2015

1 - 1 of 1 items

View All of My Evaluations

Performance (Evaluation) Plan Card

### My Evaluations [view all of my evaluations >](#)

Job Aids-3 Due: Mon, Dec 31, 2018 Status: Draft	Job Aids-2 Due: Mon, Jul 31, 2017 Status: Draft	Job Aids-1 Due: Sat, Dec 31, 2016 Status: Draft
---	---	---

- b. **Manager**—Click on the direct report whose performance (evaluation) plan you wish to view/edit/start. In doing so, you will be taken to your direct report's **Employee Details page** (covered in the Overview of NEOGOV PE) where you can select the **Performance (Evaluation) Plan** to edit/start.

### My Tasks [view all >](#)

1 Total	1 Rating	0 Approve And Sign	0 Sign	0 Approve	0 Other	1 Overdue
------------	-------------	-----------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
★ Rating For MCSC EMPLOYEE's Job Aids	MCSC EMPLOYEE	Job Aids	12/31/2015

1 - 1 of 1 items


### My Evaluations [view all of my evaluations >](#)

Job Aids-3 Due: Tue, Dec 31, 2019 Status: Draft	Job Aids-2 Due: Mon, Dec 31, 2018 Status: Draft	Job Aids Due: Sun, Dec 31, 2017 Status: Draft
---	---	---

Click on the Direct Report

### My Direct Reports

MCSC EMPLOYEE PE-Human Resources Analyst	0
---	---



**MCSC EMPLOYEE**  
PE-HUMAN RESOURCES ANALYST

Employee

Reports

Org Chart

Manager

### Employee Details

Employee #: 456321  
Email: peapi+employee@mitraining.com  
Position: PE-Human Resources Analyst  
Address:  
Phone:  
Active: Yes

Class Spec: PE-HUMAN RESOURCES ANALYST  
Department: PE-CIVIL SERVICE COMMISSION  
Division:  
Online Access: Activated  
Start Date: 05/07/2006  
Separation Date:

### Performance Evaluations

Evaluation List

Evaluation Name	Due Date	Status	Completion Date	Archived	Actions
Job Aids	12/31/2015	Not Started		No	
Job Aids-1	12/31/2016	Draft		No	

## Objectives

- On the **Evaluations Details page**, to **add objectives** to the plan, click on **Add Items** and select **New Objective**. (Department strategic objectives will be available From Library. If your department is using this functionality, you will be instructed on what to select from the library. **The State of Michigan is ONLY using From Objective Library and New Objective at this time**)

**NOTE:** Employees can edit/add/delete objectives until the performance (evaluation) plan is started/ready for review (published)

## Content

OBJECTIVE SECTION | STANDARD 3 POINT SCALE  

### Objective Section

Items	Description	Progress
No items to display		

Click on Add Items

+

 Add Items

From Objective Library  
From Position  
From Class Specification  
From Development Plan  
From Last Scheduled Evaluation  
From Employee Goal  
New Objective

- The Add Objective slide out will open. Add the **Objective Title** in the **Objective Name Field**. Enter a due date if desired (it's not required), add a **Description** to ensure both the employee and manager/supervisor are clear on what the objective is intended to achieve and how it will be measured. Select an **Objective Category** for the objective. Most objectives will be categorized as **Employee**. Under the additional settings tab, a **priority** can be selected. **Reminder settings** can also be set.

Objective Categories are outlined below:

- Department Plan objectives are associated with the department's strategic plan, mission, vision, etc.
- Strategic Plan objectives are associated with the strategic plan, initiatives, projects, business plan, etc.
- Employee objectives are associated with the employee's activities for the review (evaluation)

period.

The screenshot shows the 'Add Objective' form with the following fields and callouts:

- Objective Name \***: Callout 'Objective Name' points to the text input field containing 'Adding a New Objective'.
- Category \***: Callout 'Select a Category' points to the dropdown menu showing 'Employee'.
- Objective Due Date**: Callout 'Due Date' points to the date picker field showing 'select date'.
- Description**: Callout 'Enter the Description' points to the text area containing 'Adding a new objective for job aids'.
- Priority Level**: Callout 'Priority Level' points to the dropdown menu showing 'Medium'.
- Reminder Settings**: Callout 'Reminder Settings' points to the 'Reminder Notices' section, which includes radio buttons for 'Off' (selected) and 'On', and checkboxes for '30 Days Before', '2 Weeks Before', '1 Week Before', and 'Custom' (checked) with a value of '0' days.

Additional form elements include a 'Cancel' button, a green 'Save' button, and a blue 'Save' button with a speech bubble icon. The form is titled 'Add Objective' and has a 'General' tab selected.

3. Click on **Save**
4. Repeat these steps for all additional objectives.
5. Each objective is accompanied by a **Progress** slider bar, which may used to update the percentage complete for that objective. Reports may also be run on this information. (The slider bar appears on the **Evaluation Details page** in the Objectives section.)

OBJECTIVE SECTION   STANDARD 3 POINT SCALE					+ Add Items	
Objective Section						
	Items	Description	Progress		Actions	
⋮	1901 CSC Follow the ...	Follow the approved standardized office s...	0%		✕	
⋮	Receive Customer Ra...	This objective is measured by the annual s...	20%		✕ ✎	

The progress slider bar

- To **Edit** an **Objective** click on the pencil icon.

**NOTE:** Only the creator of the objective can edit it. Objectives added as “New Objectives” can be edited (Objectives added from the Library are not editable).

- To **delete** an objective, click on the “**X**” icon in the Actions column. The system will prompt you to confirm the deletion of the objective.

OBJECTIVE SECTION   STANDARD 3 POINT SCALE						
Objective Section						
	Items	Description	Progress		Actions	
⋮	1901 CSC Follow the ...	Follow the approved standard...			✕	
⋮	Receive Customer Ra...	This objective is measured by the annual s...	20%		✕ ✎	

To edit an objective click on the pencil icon

To delete an objective click the "x"

## Bulk Objectives

If you are a **Manager**, the ability to add an objective to multiple employees at the same time is available using a **bulk tool**.

- In the **Performance Evaluations** menu, select **Performance Evaluation List**.

The **Evaluation List** will populate based on system security, displaying only the direct reports associated to the manager.

NEOGOV PE Perform

Performance Evaluations

Performance Evaluation List

My Tasks

Select Performance Evaluation List

Total Rating Approve & Sign Sign Approve Other Overdue

Hide table

Task For Employee Related To Due Date

No Results Found

No items to display

- On the **Evaluation List**, select the employees/evaluations that will receive the objective(s). Objectives can be added to evaluations in **Draft** and **Not Started** status only.

Evaluation List

3 records are selected. Select all 9 records Clear selection

Select the Employee/Evaluations that will receive the Objective(s)

	Name	Employee #	Employee	Department	Raters of Rec	Type	Due Date	Status
<input type="checkbox"/>	Demo-Peer Rating	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	MICHAEL WINTERS	Periodic	12/31/2015	Draft
<input type="checkbox"/>	Job Aids	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Approval
<input checked="" type="checkbox"/>	Job Aids	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	CHRISTINE SPITZLEY	Periodic	12/31/2016	Draft
<input type="checkbox"/>	Job Aids 2	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Approval
<input type="checkbox"/>	Testing Future Goals 2016	1072756	JESSICA ZWEERING	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Completed
<input checked="" type="checkbox"/>	Testing Future Goals 2017	1072756	JESSICA ZWEERING	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2017	Draft
<input type="checkbox"/>	Bi-Monthly PE Meeting 9/13/2016	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Draft
<input type="checkbox"/>	Add an Objective	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	CHRISTINE SPITZLEY	Periodic	12/31/2016	Not Started
<input checked="" type="checkbox"/>	Add an Objective	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	MCSC MANAGER	Periodic	12/31/2016	Not Started

1 - 9 of 9 items

- Click on the **Bulk Actions** button. Select **Assign Goals (Objectives)** from the Evaluation Bulk Actions section.

NEOGOV PE Perform

Evaluation List

3 records are selected. Select all 9 records Clear selection

Click on Bulk Actions

Actions

EXPORT ACTIONS

Export to PDF

Export to Excel

Export to CSV

EVALUATION BULK ACTIONS

Assign Goals

Print

Click on Assign Goals (Objectives)

- On the **Objectives Assignment** page, click on the **+Objective** button to add the Objective. From

**Library** allows for the assignment of existing Objectives housed in the Objective Library. **New Objective** allows for the creation of a new Objective.

Step 2 of 3: Objectives Assignment

No Objectives have been added

Click on +Objective to add an Objective.

+ Objective

From Library

New Objective

Selected Evaluations ▲ 1 section(s) still blank

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal
Add an Objective	MCSC EMPLOYEE	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Not Started	No	Objective Section
Job Aids	MCSC MANAGER	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Draft	No	Objectives
Testing Future Goals 2...	JESSICA ZWEERING	PE-CIVIL SERVICE CO...	Periodic	12/31/2017	Draft	No	Select one

1 - 3 of 3 items

Cancel Next

5. Enter the **Objective Title**, **Description**, and select a **Category** (usually Employee). When finished, click on **Add**.

Add Objective

Cancel Add

Title

Entering a New Objective

Description

This is where I enter the text.

Category

Employee

Click on Add

Enter the Objective Title, Description, and select the Category.

Step 2 of 3: Objectives Assignment

No Objectives have been added

Selected Evaluations ▲ 1 section(s) still blank

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal
Add an Objective	MCSC EMPLOYEE	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Not Started	No	Objective Section
Job Aids	MCSC MANAGER	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Draft	No	Objectives
Testing Future Goals 2...	JESSICA ZWEERING	PE-CIVIL SERVICE CO...	Periodic	12/31/2017	Draft	No	Select one

1 - 3 of 3 items

Cancel Next

6. Enter any additional Objectives that should be added to the selected employees via the bulk action tool. When finished, select **Objective** for the section where the Objective(s) will be added within the evaluation. Click on **Next**.

NEOGOV **PE** Perform Search MCSC MANAGER

Employees Performance Evaluations Library Trainings Reports

### Step 2 of 3: Objectives Assignment

Entering a New Objective
This is where I enter the text.

#### Selected Evaluations

Name	Employee	Department	Type	Due Date	Status	Overdue	Section to Add Goal
<a href="#">Add an Objective</a>	MCSC EMPLOYEE	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Not Started	No	Objective Section
<a href="#">Job Aids</a>	MCSC MANAGER	PE-CIVIL SERVICE CO...	Periodic	12/31/2016	Draft		Objectives
<a href="#">Testing Future Goals 2...</a>	JESSICA ZWEERING	PE-CIVIL SERVICE CO...	Periodic	12/31/2017	Draft		Objectives

1 - 3 of 3 items

Cancel
Next

7. On the Confirmation page, review the data and click on **Submit** to add the Objective(s).

NEOGOV **PE** Perform Search MCSC MANAGER

Employees Performance Evaluations Library Trainings Reports

### Step 2 of 3: Confirmation Page

Employee Name	Evaluation Name	Evaluation Type	Evaluation Status	Evaluation Due Date	Section Name	Section Response Format
JESSICA ZWEERING	<a href="#">Testing Future Goals 2017</a>	Periodic	Draft	12/31/2017	Objectives	Standard 3 Point Scale
MCSC EMPLOYEE	<a href="#">Add an Objective</a>	Periodic	Not Started	12/31/2016	Objective Section	Standard 3 Point Scale
MCSC MANAGER	<a href="#">Job Aids</a>	Periodic	Draft	12/31/2016	Objectives	Standard 3 Point Scale

1 - 3 of 3 items

Edit
Submit

8. A confirmation page will display when the action is complete.

### Step 3 of 3: Bulk Actions Status

[< Go back](#)

#### Action progress

If selecting many records, the bulk action may require some time to complete. You can check the progress and results of the bulk action on this screen.

① Bulk operation is complete, records that could not be processed are shown below.

100%

Need to go? You can always find this screen by visiting this link:

<https://performance.uat.neogov.net/eval2/BulkOperationStatus/33d4c514-7ef4-4179-970c-fb99c79715e3>

#### Failed Records



Name	Employee	Type	Due Date	Status	Released	Overdue	Language	Archived	Status Message
No Results Found									
No items to display									

## Competencies

1. On the **Evaluations Details page**, to add **Competencies** to the evaluation (plan), click on **Add Items** and select **From Library** or **From Class Specification**.

**NOTE:** **From Library** allows you to select the competencies to add. **From Class Specification** adds every competency from the ECP Group to the section.

**NOTE:** Employees can add/delete competencies until the performance (evaluation) plan is started/ready for review (published).

2. **Competencies** are assigned to the performance (evaluation) plan template based on ECP (Equitable Classification Plan) Group. If you do not know your Group, you can find the information in the Compensation Manual. The Compensation Manual is available on the Civil Service Commission (intranet) Insider under Top 10 Links or on the Civil Service Commission home page (internet) under MCSC Quick Links.
3. **Click on Section A** in the Compensation Manual.



## Compensation Plan 10/01/2016 (Interactive Version)

- Section A - Alphabetic List of Classes 10/01/2016
- Section B - Numeric List of Pay Ranges 10/01/2016
- Section C - Pay Schedules for Classifications in Performance Pay Programs, Senior Attorney, IT Analysts/Coordinators P11, State Police Digital Forensics Analyst P11, Student Assistants, Transitional and Bargaining Unit T01 10/01/2016
- Teacher Pay Schedules 10/01/2016

### Section A

4. Locate your **HRMN Position Description** (job classification) and review the information in the Job Class column. CL1 is Group 1; CL2 is Group 2; CL3 is Group 3 (there is a Group 3 Manager and a Group 3 Supervisor); CL4 is Group 4.

HRMN Position Description	Grade	Core Pos Code	Schedule	Unit	Exempt	Salary Class	Pay Plan	Shift	Job Cat	Job Class	Min.	Max.
<a href="#">Accountant Manager-4</a>	15	ACCTMGR4	<a href="#">NERE-188</a>	Y51	Y				2	CL3	\$30.01	\$44.41
<a href="#">Accountant-A</a>	12	ACCOUNTA	<a href="#">NERE-180</a>	Y23	Y				2	CL2	\$22.71	\$33.21

Job Class is ECP Group

5. Select the appropriate competency by clicking in the checkbox in front of it and selecting **Save**.

**NOTE:** Competencies are entered in NEOGOV PE with (100), (200), (310), (320), or (400) after them. The following applies:

- Group 1 competencies are followed by (100)
- Group 2 competencies are followed by (200)
- Group 3 MGR competencies are followed by (310)
- Group 3 SPV competencies are followed by (320)
- Group 4 competencies are followed by (400)

## Add Items

Cancel Save

### Competency library

Click on Save

1 records are selected. Clear selection Select all 138 records

<input type="checkbox"/>	Name	Description	Actions
<input type="checkbox"/>	Action Orientation (Prof)	Initiating action with a drive to achieve an...	
<input type="checkbox"/>	Adaptability (100)	Maintaining effectiveness when experienc...	
<input checked="" type="checkbox"/>	Adaptability (200)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (310)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (320)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (400)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (Judicial Admin)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (Judicial Leader)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Adaptability (Judicial Prof)	Maintaining effectiveness when experienc...	
<input type="checkbox"/>	Aligning Performance For Success (310)	Focusing and guiding others in accomplis...	

<< < 1 2 3 4 5 6 7 8 9 10 ... > >>

Select the Competencies to add

6. To **delete** a competency click on the “x” icon.

### COMPETENCY SECTION | STANDARD 3 POINT SCALE

+ Add Items

### Competency Section

Click on the "X" icon to delete the Competency

Items	Description	Actions
⋮ Adaptability (200)	Maintaining effectiveness when experiencing major changes in pers...	×
⋮ Building Strategic W...	Identifying opportunities and taking action to build strategic relatio...	×
⋮ Building Trust (200)	Interacting with others in a way that gives them confidence in one's ...	×

## Tasks

1. The **Process Timeline Tasks** for the employee's plan acknowledgement, rating acknowledgement, self-rating (if applicable) and the manager/supervisor review will be defaulted into the plan from the performance (evaluation) plan template. These tasks will appear on the associated employee's (and manager/supervisor's) My Dashboard. Reminder and overdue notices are sent based on template configuration.
2. **New tasks** can be added to the performance (evaluation) plan by clicking on the **Add Task** button. Tasks added to an employee's performance (evaluation) plan are visible to the manager in the Process section, and they will show up on the employee's My Dashboard.

Process

Before Ratings

Add Task

3. Complete the applicable boxes:
  - a. Enter a name in **Choose Person**.
  - b. Enter a title in **Title**.
  - c. Enter a **Description** if necessary.
  - d. Select a **Due Date** from the calendar.
  - e. **Reminder Settings** can be set prior to the task due date or after.
  - f. Click on **Save** or **Cancel**

### Add Task

Add Task

Cancel Save

Step Settings

Assignee Type  
Employee

Choose Person  
Search employee

Title

Description

Due Date  
03/07/2017

Reminder Settings ^

Reminder Notices  
☒ Off ☐ On  
☐ 30 Days Before  
☐ 2 Weeks Before  
☐ 1 Week Before  
☒ Custom 0 Days Before

Overdue Notices  
☒ Off ☐ On  
☐ Every Week  
☒ Every 2 Days  
☐ Every Day  
☐ Custom Every Days

## Notes & Attachments

1. **Notes & Attachments** can be added to the performance (evaluation ) plan using the **Add Notes & Attachments** button.

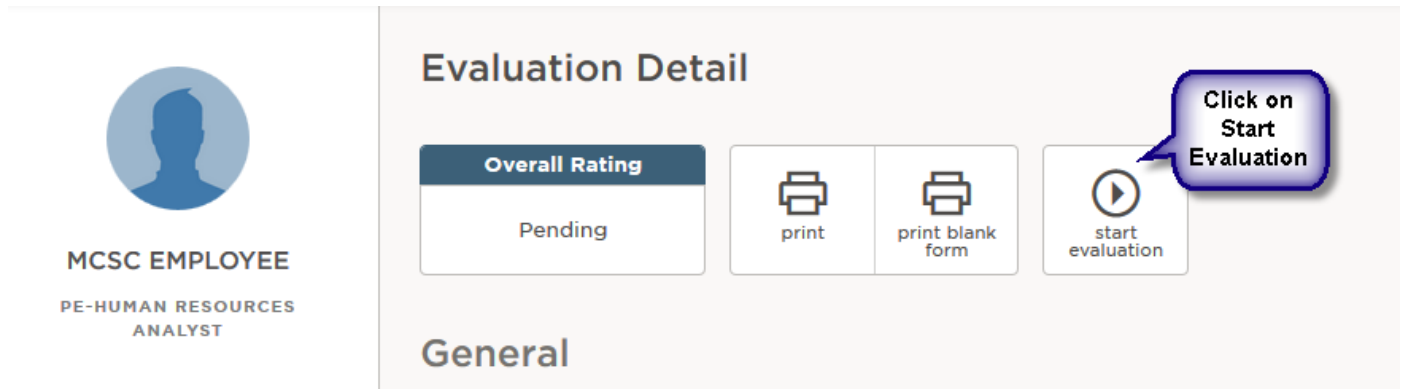
The screenshot displays the NEOGOV Performance Evaluation interface. On the left, a sidebar shows the user profile for 'MCSC EMPLOYEE PE-HUMAN RESOURCES ANALYST' and navigation links for 'Employee', 'Reports', 'Org Chart', and 'Manager'. The main content area is titled 'Notes & Attachments' and features a 'COMPETENCY SECTION | STANDARD 3 POINT SCALE' table. This table lists competencies such as '1901 CSC Follow the ...', 'Receive Customer Ra...', 'Building Strategic W...', 'Building Trust (200)', and 'Adaptability (200)'. Each row includes a progress bar and an 'Actions' column with a delete icon. Below the table, there is a '+ Add Items' button and a '+ Add Notes & Attachments' button. A callout bubble points to the '+ Add Notes & Attachments' button with the text 'Click on Add Notes & Attachments'.

1. Notes can be typed directly. Some formatting including spell checker is available. Attachments can be added by using the **+Attachment** button. If **Private Note** is checked, only the manager/supervisor can see the note. Click **Save**.

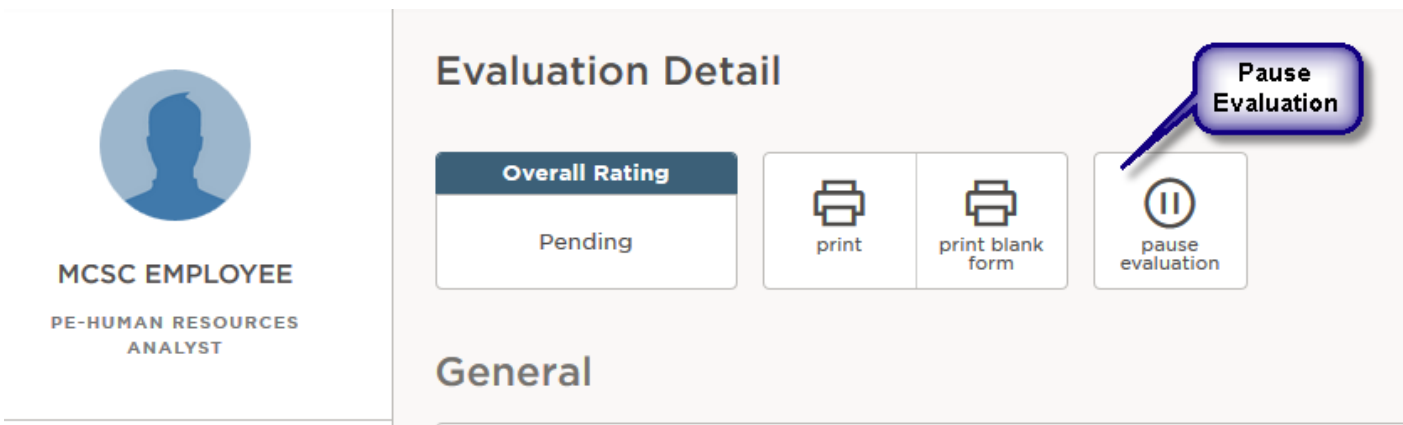
The screenshot shows the NEOGOV Performance Evaluation interface with the 'Add Note/Attachment' dialog box open. The dialog box has a 'Cancel' button and a 'Save' button. It contains a 'Note' section with a text area and a rich text editor toolbar. A callout bubble points to the text area with the text 'Add the text for the Note'. Below the text area is an 'Attachment' section with a '+ Attachment' button and a 'Browse for an Attachment' button. A callout bubble points to the 'Browse for an Attachment' button with the text 'Browse for an Attachment'. At the bottom of the dialog box, there are checkboxes for 'Private Note' and 'Use As Rating Form'. A callout bubble points to the 'Private Note' checkbox with the text 'Private Note'. The background shows the same sidebar and main content area as the previous screenshot.

## Start Evaluation

1. When the performance (evaluation) plan is complete, it can be made **ready for review** by clicking on the **play button, Start Evaluation**. Once the plan is started/ready for review (published), changes cannot be made to the plan (unless reverted to draft status).



2. After the performance (evaluation) plan is started/ready for review (published), an email is sent to the employee regarding the **Acknowledgement of Plan**.
3. The performance (evaluation) plan can be paused/reverted to draft status (unpublished) if changes need to be made to any part of it via the **pause button**. If changes are made to Objectives/Competencies, the Acknowledgement of Plan email for the employee will be sent again once the evaluation is started/ready for review (published).



4. Once ready for review, the **Status** of the performance (evaluation) plan changes from **Draft** to **Not Started**.

## Acknowledgement of Plan

1. When an employee and manager agree on the performance evaluation plan established for the review period, including objectives and competencies, the manager will make the evaluation ready for review. This locks the plan to additional changes. At that time, the employee will receive an **email** instructing them to login to NEOGOV PE to acknowledge the performance evaluation plan. The email will look similar to the one below.

# NEOGOV

Acknowledgement of evaluation plan **Testing New Enhancements 1-20-15** has been assigned to you in **NEOGOV PE**. Please use the link below to login, view, and acknowledge the evaluation plan.

**Subject:** [Acknowledge the Evaluation Plan Testing New Enhancements 1-20-15](#)

**Due Date:** 02/19/2015

**Priority:** Medium

**Status:** Current

**Comment:**

Clicking on the link will take you to the NEOGOV login page

- On the **My Dashboard** screen, you will see an Acknowledgement task listed in the **My Tasks** section. Click on the subject, **Sign...** to go to the Acknowledgement window.

NEOGOV PE Perform

Search

MCSC EMPLOYEE

Employees Library

My Tasks [view all](#)

1 Total 0 Rating 0 Approve & Sign 1 Sign 0 Approve 0 Other 0 Overdue

hide table

Task	For Employee	Related To	Due Date
Sign Enhancements Demo 4-26-16 for MCSC EMPLOYEE	MCSC EMPLOYEE	Enhancements Demo 4-26-16	05/03/2016

My Evaluations [view all of my evaluations](#)

Demo of Job Aids Due: Sat, Dec 31, 2016 Status: Not Started

Enhancements Demo 4-26-16 Due: Sat, Dec 31, 2016 Status: Not Started

Job Aids Due: Thu, Dec 31, 2015 Status: Draft

- In the **Evaluation Acknowledgement (Before Ratings)** window, review the assigned performance evaluation by clicking on each section title

## Before Ratings

MCSC EMPLOYEE PE-Human Resources Analyst

EVALUATION NAME Job Aids

DUE DATE Sat. Dec. 31, 2016

Sign

Click on Sign

Review assigned Objectives and Competencies by clicking on the section title

Content

Objective Section

Competency Section

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

Name	Description
Receive Customer Rating of at least 4.0 ou...	This objective is measured by the annual survey. If employee does not get a rating of 4.0, employee will meet weekly with supervisor.

- Click on the **Sign** button to open the signature pane. Enter any comments and acknowledge/agree to the evaluation by clicking on **Submit**. The evaluation will now be available for rating by your manager.

**NOTE:** Clicking on the **Cancel** button will return you to your dashboard without acknowledging the evaluation plan. If you do not acknowledge your evaluation plan, please follow up with your manager.

NEOGOV

PE Perform

Search

Employees

Library

Before Ratings

MCSC EMPLOYEE

PE-Human Resources Analyst

EVALUATION NAME

Job Aids

DUE DATE

Sat. Dec. 31

Content

Objective Section

Competency Section

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

Name	Description
Receive Customer Rating of at least 4.0 ou...	This objective is measured by the annual survey. If employee does not

Sign

Cancel

Submit

Comments

Write comment

Please sign your name below

Are you sure you wish to acknowledge the plan at this time? By selecting OK, I certify that I have reviewed the competencies and/or performance objectives/factors identified on this form.

MCSC EMPLOYEE

MCSC EMPLOYEE

July 26, 2016

Auto-Generate

Draw Signature

- The **Acknowledgement** will no longer appear on the **My Dashboard** screen.

**NOTE:** If a performance evaluation plan is reverted to Draft Status, and a change is made to Objectives and/or Competencies, a new email will be generated asking for acknowledgement of the updated evaluation plan. Follow the steps above to re-acknowledge the modified performance evaluation plan.

## Rating (Both Self-Rating and Rater of Record-Manager)

- There are two options to get to the Rate screen:

Option 1:

On the **My Dashboard** screen in the **My Tasks** section click the **Rate** link in the **Task** column.

NEOGOV

PE Perform

Search

Employees

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Trainings

Reports

MCSC MANAGER

My Tasks [view all](#)

1 Total

1 Rating

0 Approve & Sign

0 Sign

0 Approve

0 Other

0 Overdue

hide table

Task	For Employee	Related To	Due Date
★ Rating For MCSC EMPLOYEE's Demo of Job Aids	MCSC EMPLOYEE	Demo of Job Aids	12/31/2016

Click on the link to be taken to the rate screen

My Evaluations [view all of my evaluations](#)

Job Aids

Due: Sat, Dec 31, 2016

Status: Draft

Demo-Peer Rating

Due: Thu, Dec 31, 2015

Status: Completed

MCSC PROB-1

Due: Thu, Dec 31, 2015

Status: Draft

My Direct Reports

MCSC EMPLOYEE

PE-Human Resources Analyst

0

0

Option 2:

On the **My Dashboard** screen click on the **Evaluation Card** that needs to be rated.

On the Evaluation Detail page, Click on the **Rate** star.

NEO GOV PE Perform

Search

MCSC EMPLOYEE

Employees Library

MCSC EMPLOYEE  
PE-HUMAN RESOURCES ANALYST

Job Aids  
MCSC EMPLOYEE

☆ rate print preview print blank form

Overall Rating  
Pending

General Information

DUE DATE  
Sat. Dec. 31, 2016

STATUS  
Not Started

Evaluation Name Job Aids  
Type Periodic  
Archived No

Employee MCSC EMPLOYEE  
Position PE-Human Resources Analyst  
Department PE-CIVIL SERVICE COMMISSION

My Dashboard  
Employee  
Reports  
Org Chart  
Manager

- On the **Performance Evaluation Rating Form** screen, complete the **Objective and Competency Sections** by clicking on each Objective/Competency title to open the associated rating window.

**Note:** You can also navigate through the objectives and competencies by clicking **Next**, **Prev**, or **Done** as you complete the rating.

NEO GOV PE Perform

Search

MCSC EMPLOYEE

Employees Library

< back to evaluation detail page

Overall Rating Not Available Submit Evaluation

MCSC EMPLOYEE  
PE-HUMAN RESOURCES ANALYST

Job Aids

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

Receive Customer Rating of at least 4.0 out of 5.0

no comment

SECTION

Objective Section

Competency Section

Overall Rating

Summary

- Click on the check mark next to the appropriate rating (note: the selection turns a green color. To deselect a rating click on it again). Comments can be entered and formatted. Click on **Next**.

**NOTE:** If a self-rating is being done, the manager will see the rating and comments (after the rating is submitted).



NEOGOV **PE** Per

Employees Library

OBJECTIVE SECTION  
Objective Section

Done Next >

< back to evaluation details

Overall Rating Not Available

MCSC EMPLOYEE  
PE-HUMAN RESOURCE ANALYST

SECTIONS

Objective Section

Competency Section

Overall Rating

Summary

Receive Customer Rating of at least 4.0 out of 5.0

This objective is measured by the annual survey. If employee does not get a rating of 4.0, employee will meet weekly with supervisor.

RATING SCALE \* Required

Show descriptions >

☒ Needs Improvement

☒ Meets Expectations

☒ High Performing

Select the appropriate rating

COMMENTS

B I U

Enter and format text here

Enter any applicable comments

Click on Next to move to the next Objective or Competency in the evaluation.

4. **Writing Assistants** are available for **competencies** only. Writing Assistants contain the Behaviorally-Anchored Rating Scales (BARS) for the competency and provide examples of behaviors that can be used to determine the appropriate rating.

NEOGOV **PE** Per

Employees Library

COMPETENCY SECTION  
Competency Section

Done < Prev Next >

< back to evaluation details

Overall Rating Not Available

MCSC EMPLOYEE  
PE-HUMAN RESOURCE ANALYST

SECTIONS

Objective Section

Competency Section

Overall Rating

Summary

Adaptability (200)

Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effectively to work within new work structures, processes, requirements or cultures.

RATING SCALE

Show descriptions >

☒ Needs Improvement

☒ Meets Expectations

☒ High Performing

COMMENTS

B I U

WRITING ASSISTANT

No Tone

- Makes active attempts to delay or prevent change from occurring.
- Fails to implement change as required.
- Is vocally negative or exhibits negative attitude about change.
- Refuses to learn new concepts.
- Challenges new work methods/procedures.
- Avoids complying with new requirements or work situations.
- Dwells on how things were done in the past. Lingers in disoriented state when change occurs; has difficulty accomplishing tasks.

Add to Comment Box

No Tone

- Maintains quality of work when changes occur in the work environment.
- Addresses change with a positive attitude.
- Understands that changes occur and effectively and efficiently incorporates them into work routine.
- Exhibits willingness to comply with change.
- Quickly modifies behavior to deal with change.
- Focuses on beneficial aspects of change.
- Actively seeks information about new work situations.

Add to Comment Box

Click Add to Comment Box to add the applicable Writing Assistant section to the Comments box above.

5. Once the BARS statements have been entered into the evaluation, they can be formatted and deleted completely or partially.

6. An **Overall** rating is required for the evaluation. To complete the **Overall Rating**, click on the check mark next to the appropriate rating (note: the selection turns a green color. To deselect a rating click it again). Comments can be entered and formatted. Click on **Done** when finished.

**NOTE:** If a self-rating is being done, the manager can see the selected ratings and comments.

NEO GOV PE Perform

Employees Library

Overall Rating

Overall Rating Meets Expectations

Done

Click on Done.

RATING SCALE \* Required

Show descriptions >

Needs Improvement

Meets Expectations

High Performing

COMMENTS

Enter text here...

Enter text.

REVIEWERS

JOURNAL ENTRIES

MCSC EMPLOYEE PE-HUMAN RESOURCES ANALYST

Meets Expectations

Enter text here.

7. The system automatically saves the work.
8. Review the Summary page. Click **Submit Evaluation** when done with the rating. Click **Print Current State** if you would like to maintain a hard copy.

NEO GOV PE Perform

Employees Library

Job Aids

Overall Rating Meets Expectations

Submit Evaluation

Print Current State

Expand all cards

OBJECTIVE SECTION | STANDARD 3 POINT SCALE

Objective Section

Receive Customer Rating of at least 4.0 out of 5. Meets Expectations

Enter and format text here

COMPETENCY SECTION | STANDARD 3 POINT SCALE

Competency Section

Adaptability (200) Meets Expectations no comment

Building Strategic Working Relationships (200) Meets Expectations no comment

Building Trust (200) Meets Expectations no comment

Click on Submit Evaluation

Click on Print Current State

9. If **Submit Evaluation** is selected, the system will provide a certification statement for review. If you feel changes are necessary, click **Cancel**. If changes are not necessary, click **Continue**.

### You're almost done!

Are you sure you wish to submit the review at this time? Selecting OK will prevent any further changes by you or the employee. By selecting OK, I certify that this rating form constitutes my evaluation of the performance of this employee for the period covered.

*MCSC EMPLOYEE*

Do you wish to continue?

Cancel

Continue

Click on  
Continue

### You're almost done!

Are you sure you wish to submit the review at this time? Selecting OK will prevent any further changes by you or the employee. By selecting OK, I certify that this rating form constitutes my evaluation of the performance of this employee for the period covered.

*MCSC MANAGER*

Do you wish to continue?

Cancel

Continue

Click on  
Continue

10. After selecting **Continue** a confirmation will appear stating that it has been submitted. The review/rating is now complete.


### Success!



Your evaluation for **MCSC EMPLOYEE** has been submitted.

Close

11. Please note that the system has a language checker in it, and if you try and submit a self-rating that contains inappropriate language, the system will alert you and provide you with an opportunity to make a change before certifying and submitting.




**MCSC EMPLOYEE**  
PE-HUMAN RESOURCES ANALYST

Employee

Reports

Org Chart

Manager



### Adaptability (200)

Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effectively to work within new work structures, processes, requirements or cultures.


✓ Needs Improvement

✓ Meets Expectations

✓ High Performing

[View Rating Scale](#)

Inappropriate language detected:

**B I U** 

The employee doesn't do


[Open Writing Assistant](#)


Competencies 1 of 2






12. **For Managers**, once finished with a rating there are two options to rate another employee:


Option 1:

Click on **NEOGOV** to return to your dashboard.

**NEOGOV** **PE Perform** 

 Search

    **MCSC MANAGER** 

Employees Library 


**MCSC EMPLOYEE**  
PE-HUMAN RESOURCES ANALYST

Employee

Reports

Org Chart




Manager



### Evaluation Detail

Overall Rating

Meets Expectations

 print
  print blank form
  pause evaluation

### General

DUE DATE		STATUS	
Thu. Dec. 31, 2015		Approval	
Evaluation Name	Job Aids	Employee	MCSC EMPLOYEE
Type	Periodic	Position	PE-Human Resources Analyst
Archived	No	Department	PE-CIVIL SERVICE COMMISSION

Click on NEOGOV to return to your dashboard

Click on Employees to go to the Employee List

## Option 2:

Click on **Employees** and search/select the employee to be rated. This takes you to the **Employee Details** screen.

NEO GOV Perform

Search

Employees Library Trainings Reports

### Employee List

Show All Employees

Photo	ID	Role	Department	Position	Sta	Onlr	Active
	123789	MANAGER	MCSC	PE-HUMAN RESOURCES MANAGER	06/22/2002	Activated	Yes
	456321	EMPLOYEE	MCSC	MCSC MANAGER	05/07/2006	Activated	Yes

Items per page 10 1 - 3 of 3 items

## Acknowledgement of Rating

1. When you log in, you'll arrive at your **My Dashboard**. Because you have a rating that is ready for signature you will see a signature task listed in the **My Tasks** section. Click on the subject, **Sign...** to go to the Signature window.

NEO GOV Perform

Search

Employees Library

### My Tasks [view all](#)

Task	For Employee	Related To	Due Date
Sign Demo of Job Aids for MCSC EMPLOYEE	MCSC EMPLOYEE	Demo of Job Aids	12/31/2016

### My Evaluations [view all of my evaluations](#)


Evaluation	Due Date	Status
Demo of Job Aids	Sat, Dec 31, 2016	Approval
Enhancements Demo 4-26-16	Sat, Dec 31, 2016	Completed
Job Aids	Thu, Dec 31, 2015	Draft

2. In the **Evaluation Review (After Ratings)** window, review the ratings assigned to each objective and competency in the performance evaluation by clicking on the associated section.

NEOGOV PE Perform Search MCSC EMPLOYEE

Employees Library


### After Ratings



MCSC EMPLOYEE  
PE-Human Resources Analyst

EVALUATION NAME  
**Job Aids**


DUE DATE  
**Sat. Dec. 31, 2016**



Click on Sign


### Rating Summary

Overall Rating	
Meets Expectations	



MCSC EMPLOYEE  
PE-Human Resources Analyst

Overall Rating  
**Meets Expectations**



MCSC MANAGER  
PE-HUMAN RESOURCES MANAGER

Overall Rating  
**Meets Expectations**

Objective Section

Competency Section



Overall Rating

Select the section to view



COMPETENCY SECTION | STANDARD 3 POINT SCALE

#### Competency Section

**Adaptability (200)**  
Maintaining effectiveness when experiencing major changes in personal work tasks or the work environment; adjusting effectively to work within new work structures, processes, requirements or cultures.

	MCSC EMPLOYEE	Meets Expectations	
	MCSC MANAGER	Meets Expectations	

**Building Strategic Working Relationships (200)**  
Identifying opportunities and taking action to build strategic relationships between one's area and other areas, teams, departments, units, or organizations to help achieve business goals.

	MCSC EMPLOYEE	Meets Expectations	
	MCSC MANAGER	Meets Expectations	<p>null</p> <ul style="list-style-type: none"><li>• Avoids or refuses to work with other workgroups.</li><li>• Avoids building job-related relationships.</li><li>• Fails to work cooperatively with others.</li></ul>


3. Click on the **Sign** button to open the signature pane. Enter any comments and acknowledge/agree to the rating by clicking on **Submit**.

NEOGOV
PE Perform

Search

Employees Library

### After Ratings





MCSC EMPLOYEE  
PE-Human Resources Analyst

EVALUATION NAME  
Job Aids

DUE DATE  
Sat. Dec. 31

### Rating Summary

	Overall Rating
 MCSC EMPLOYEE PE-Human Resources Analyst	Meets Expectations
 MCSC MANAGER PE-HUMAN RESOURCES MANAGER	Meets Expectations

Sign

Cancel Submit

Comments

Write comment here...

Please sign your name below

Are you sure you wish to sign the review at this time? By selecting OK, I certify that I have had the opportunity to review this rating. I understand that my certification does not necessarily mean that I agree with the rating.

MCSC EMPLOYEE

July 26, 2016

Auto-Generate Draw Signature

NOTE: Clicking on **Cancel** will return you to your dashboard without acknowledging the performance (evaluation) plan rating. If you do not acknowledge your performance (evaluation) plan rating, please follow up with your manager.

4. The **Request for Signature** will no longer appear on your **My Dashboard**.


NEOGOV
PE Perform

Search

10

MCSC EMPLOYEE

Employees Library



MCSC EMPLOYEE  
PE-HUMAN RESOURCES ANALYST

### My Tasks

Current

Search

Subject	Due Date	Related to	Actions
Rating For MCSC EMPLOYEE's Demo with Self...	12/17/2015	Evaluation MCSC EMPLOYEE	☆

1

## Reports

1. The menu option is only available to the Manager role based on configure system security. Managers have the ability to run reports on their direct reports.
2. Log in and from the **Dashboard** select the **Reports** menu option and click on **Reports**.



3. All of the reports listed have the same general configuration and field choices; however they are specific to the title listed.  
**NOTE:** For purposes of this document, I will select the **Task Status Report** to go over the fields and their functions.

## Reports

Report	Description
Evaluation Status By Department Report	Aggregated status of all active evaluations summarized by Department
Evaluation Status Detail	Detailed status of all active evaluations
Performance Rating	Overall performance ratings for selected evaluations.
Objective Status	Status of Objectives by Department.
Objective Status by Employee	Status of Objectives by employee.
Item Ratings	Individual ratings, used to identify strengths and weaknesses.
Objective Cascade	Objective Cascade Report
Employee Objectives	Individual Employee Objectives with detailed information
Task Status	Summary of Tasks and their Status
Approval Status	Approval Status for all approvals

4. Select your report and then **Scroll down** to the section where you can select and arrange the **fields** you would like displayed on your custom report.
5. Select the icon with three lines on it to choose the columns to display.

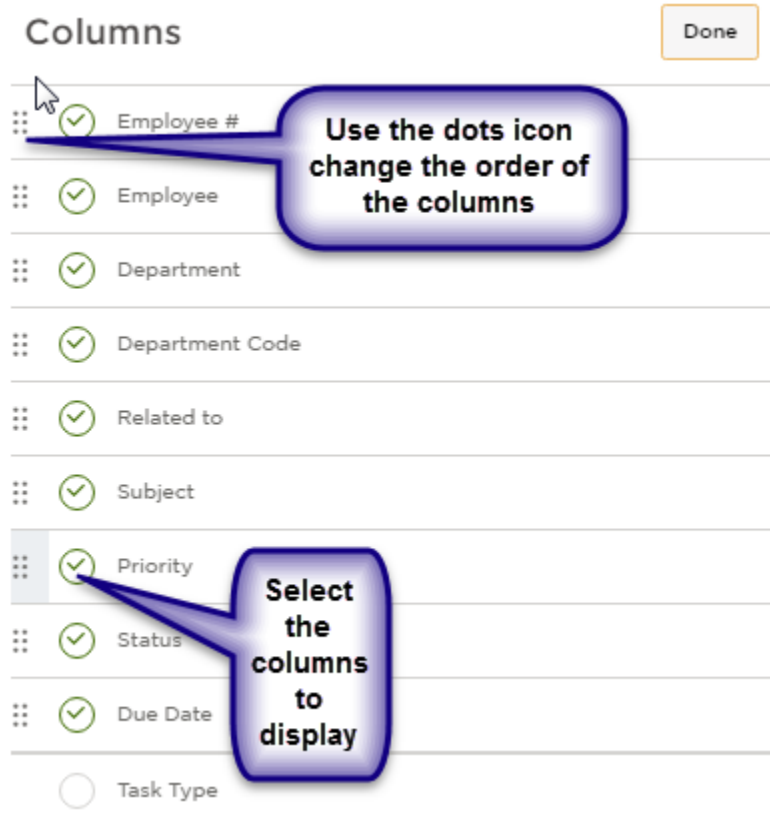
The screenshot shows the 'Task Status' report. At the top, there are buttons for 'Default' and 'Bulk Actions'. Below the table, there is a pagination bar showing '1' of 477 items. A callout bubble points to the column selection icon (three horizontal lines) in the top right corner of the table, with the text 'Select the columns to display'.

	Employee #	Employee	Department	Department Code	Related to	Subject	Status	Due Date
<input type="checkbox"/>	326574	HR USER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-3	Rating For MCSC MANAGER's Job Aids...	Low	Pending 12/31/ 2019
<input type="checkbox"/>	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-3	Sign Job Aids-3 for MCSC MANAGER	Low	Pending 12/31/ 2019
<input type="checkbox"/>	326574	HR USER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-2	Rating For MCSC MANAGER's Job Aids...	Low	Pending 12/31/ 2018
<input type="checkbox"/>	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-2	Sign Job Aids-2 for MCSC MANAGER	Low	Pending 12/31/ 2018
<input type="checkbox"/>	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-3	Rating For MCSC EMPLOYEE's Job Aids...	Low	Pending 12/31/ 2018
<input type="checkbox"/>	456321	MCSC EMPLOYEE	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Job Aids-3	Sign Job Aids-3 for MCSC EMPLOYEE	Low	Pending 12/31/ 2018
<input type="checkbox"/>	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation 1901 MCSC Group 2 Jan 1-D...	Rating For MARK PUNG's 1901 MCSC Gr...	Low	Pending 01/29/ 2018
<input type="checkbox"/>	1003712	MARK PUNG	PE-LICENSING AND REGULATORY AFF	PE-6401	Evaluation 1901 MCSC Group 2 Jan 1-D...	Sign 1901 MCSC Group 2 Jan 1-Dec 31, 2...	Low	Pending 01/29/ 2018
<input type="checkbox"/>	208008	MICHAEL WINTERS	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Jan-Dec 2017	Rating For BRANDYE HUNT's Jan-Dec 2...	Low	Pending 12/31/ 2017
<input type="checkbox"/>	182692	BRANDYE HUNT	PE-CIVIL SERVICE COMMISSION	PE-1901	Evaluation Jan-Dec 2017	Sign Jan-Dec 2017 for BRANDYE HUNT	Low	Pending 12/31/ 2017

6. In the **Columns** fly out window, **select** the columns to display by clicking on the **name**. When a **green**

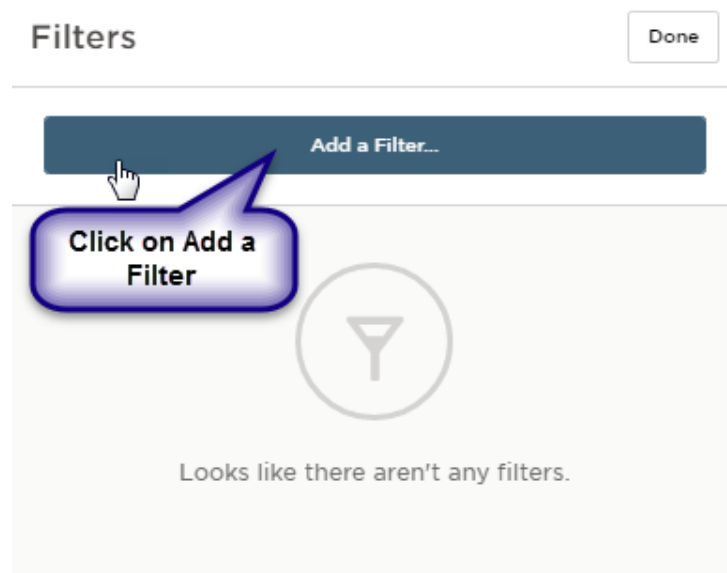


**check mark** appears next to the column name, then the column will display in the report. To **deselect** a column, click on the name. Use the **6 dots icon** to **drag and drop** the columns to the desired order/placement. When finished, click on **Done**.



7. Use the **Filter** icon to add any applicable filters to the report.

8. On the **Filters** screen, click on **Add a Filter**.



9. Select the item to **Filter** on. Then add the **Operation** to take place and any **Specific Criteria**. Click on

**Apply Filter.** If additional filters are desired, repeat the steps. When all filters are in place, click on **Done**.

The screenshot shows a 'Filters' dialog box. At the top right is a 'Done' button. Below it is a dark blue bar with 'Add a Filter...'. A 'Clear All X' link is at the top right of the filter area. The filter area contains:
 

- 'Due Date' with a callout 'Select the item to filter on'.
- 'between...' with a callout 'Select the operation'.
- Two date input fields: '12/01/2017' and '12/31/2017', with a callout 'Enter the criteria' pointing to the 'to' label between them.
- An 'Apply Filter' button at the bottom with a callout 'Click on Apply Filter'.

10. The search icon can also be used to filter by typing the criteria into the search box.

The screenshot shows a table with search capabilities. At the top, there are 'Default' and 'Bulk Actions' buttons. Below them are several search boxes labeled 'Employee #', 'Employee', 'Department', 'Status', 'Subject', and 'Related to'. A callout 'Search boxes' points to these. On the far right, there is a magnifying glass icon labeled 'Search Icon'. The table below contains data rows with columns for checkboxes, employee numbers, names, departments, statuses, subjects, evaluation periods, and dates.

	Employee #	Employee	Department	Status	Subject	Related to	Evaluation	Jan-Dec 2017	Low	12/31/ 2017
<input type="checkbox"/>		PE-CIVIL SERVICE COMMISSION	PE-1901	Pending	Rating For	Jan-Dec 2...	Evaluation	Jan-Dec 2017	Low	12/31/ 2017
<input type="checkbox"/>		PE-CIVIL SERVICE COMMISSION	PE-1901	Pending	Sign Jan-Dec 2017 for		Evaluation	Jan-Dec 2017	Low	12/31/ 2017
<input type="checkbox"/>	326574	HR USER	PE-CIVIL SERVICE COMMISSION	Pending	Rating For MCSC MANAGER's Job Aids		Evaluation	Job Aids	Low	12/31/ 2017
<input type="checkbox"/>	123789	MCSC MANAGER	PE-CIVIL SERVICE COMMISSION	Pending	Sign Job Aids for MCSC MANAGER		Evaluation	Job Aids	Low	12/31/ 2017

11. When your data is set, and if you'd like to **export** it to PDF, Excel, or CSV format, select the records you'd like to export and click on **Bulk Actions**. Then choose the **Export** option and click on **Done**.

NEOGOV

PE Perform

Search

Employees

Performance Evaluations

Library

Trainings

Reports

Task Status Report

Number of Tasks

Task

178

107

Rater

145

158

On Time

Overdue

Total

Default

Bulk Actions

4 records are selected.

Employee #

Employee

Department

Departmen

Status

Subject

Actions

EXPORT ACTIONS

Export to PDF

PDF

Export to Excel

XLS

Export to CSV

CSV

Done

Click on Done

Choose the Export Option

Click on Bulk Actions

12. To return to your dashboard click on NEOGOV.